TS-EAS EAC-CPF Berlin meeting

Attendees (in person)

Name	Institution	Role
Gerhard Müller	Staatsbibliothek zu Berlin, DE	TS-EAS ex officio
Joost van Koutrik	Het Utrechts Archief, NL	TS-EAS
Karin Bredenberg	Kommunalförbundet Sydarkivera, SE	TS-EAS co-chair
Kerstin Arnold	Archives Portal Europe Foundation, EU	EAD team lead
Silke Jagodzinski	Geheimes Staatsarchiv Preußischer Kulturbesitz, DE	EAC-CPF team lead

Thursday, 12 March 2020

Regine and Caitlin were forced to reschedule their flight to the US. Present are Silke, Kerstin, Karin, Gerhard, Joost. Cory is phoning in via Zoom.

Documentation: tag library and best practise guidelines

Ailie Smith is joining the meeting via Zoom for the Tag Library and Best Practice Guide proposals. See the [Proposal document](#), which compares the EAD and EAC Tag Libraries. This document has seven proposals c.q. topics for discussion; these notes follow the structure of that document. The Tag Library will remain essentially the same.

Availability information in the tag library

Proposal is to detail the differences for making clear whether an element is mandatory or not. Karin agrees with the proposal, noting that this was previously a discussion for the EAD Tag Library. Silke proposes to also note the technical cardinality, e.g.: (0..1) or (0..n).

Gerhard is asking to clarify if it has been tried to express these relations as an XPath expression. Karin has tried this, but it doesn't allow for cardinality and is not accepted further on the road as a method for clarification.

The proposal is accepted as is. Karin will talk to Alex if it's possible to make the technical cardinality expressible.

Decision: Add technical cardinality next to the description in the TL.

The 'May contain' statement is not consistently stated in the EAC Tag Library. It should be more clear if a part element 'must' occur within a parent element. Best approach would be to have a separate part for expressing the availability, to make this explicit, similar to how this is done in the EAD Tag Library.

Separate parts for description and usage have been attempted. This did not work well then. If we wanted to keep them under one heading, we could consistently write them in a logical order.

Ailie works out a few examples to make the approach visible for review.

Consistency of terminology

Currently there is a difference between the Tag Libraries: mandatory vs. required and Non-repeatable vs. not repeatable. The team does not have any strong preferences. 'Required' is also used in the Schema.

It is agreed upon to change these terms to those used in the EAD Tag Library descriptions.

Decision: Adapt EAD3 solution for availability information.

Consistency of descriptions

This concerns having the same name and description between EAD and EAC Tag Libraries.

It is suggested to have a native English speaker to go through the summaries and descriptions where elements are similar between the two Tag Libraries.

Karin will provide a separate proposal on how to handle the Tag Library in GitHub.

As for the question how we would do this if we had further EAC entities added in the future, the approach would be to keep the shared elements consistently maintained, and adding specific ones for each new EAC entity.

Expression of <control> element

Currently <control> is described in detail in the introduction to the TL as well as in the elements' part of the TL. The proposal is to concentrate on the latter and to make it clearer, which elements are mandatory, e.g. by having the according statement as the very first sentence of the "Description and usage" part, and to allow for examples.

The introductory texts are useful, but should in this case be cut down to the minimal requirements for a well-formed EAC-record. There is a simplified part that can be included, leaving the detailed information on elements in the Tag Library descriptions of those elements.

Other sections in current Tag Library

It is proposed to move the detailed parts of the introduction (background, concept, structure and semantics) to the Guidelines document.

The Tag Library conventions and release notes should be in the Tag Library.

The Background and Dedication part should be placed in another part of the website and Kathy is going to be asked to update the text.

The crosswalks should be kept in the TL. EAD has a reference label to the crosswalks.

Decision: The Tag Library should contain: conventions, release notes, crosswalk. Text on background moves to the website. The glossary should be part of the Best Practise Guide.

Best Practice Guide

The document about Names also discusses Best Practices. Examples given by EAC-CPF users are useful to share. The Tag Library has some simple examples. The Best Practice Guide could contain examples written in more detail. Ailie asks if other things should be added to this guide.

It is agreed that this should be a separate document, comparable to the approach that PREMIS is taking.

Strategy for capturing Tag Library content

Have a strategy to separate descriptions and examples between the Tag Library and the Best Practice guide. Ailie will look through the issues and questions, if there are examples given in those.

It is agreed upon to use the GitHub issues to process new examples and descriptions. Adding labels and other such issues can also be done via GitHub. Ailie agrees to reset/manage new labels in GitHub.

Ask for people participating in the Call for Comments to provide TS-EAS with all the pertinent examples from practice that they have.

Kerstin notes that there are also instances of NMTOKEN being described as an element or attribute under 'May contain', but it is obviously not an element or attribute. Need to ensure this term is written in square brackets for the transformation not to create links. Alex has also been looking at the links in element names that have been created, but do not lead to the (part of) the name being expressed. Be careful about what you put in the text and whether this leads to unwanted links.

Furthermore, there have been two additions:

- Regarding the attributes, it would be useful to also have examples from practice for those as well.
- The values for ISO 3166 country codes are copied from the EAD page. Suggested is to link to the codes (same as languages) at the LoC website instead of maintaining it in the Tag Library. Also align the Description definition from EAD3.

There will be no need for a separate meeting with the Schema Team.

Ailie and Lina are working on the Tag Library. Silke notes that this is expected to be a quite laborious process. For EAC-CPF there were a number of people. For EAD, there were five people doing the writing work. Managing this is made easier in GitHub branch. Ailie is in the lead for this work, and should be able to call upon assistance if the work becomes more time-consuming.

Silke will call to the TS-EAS to get volunteers for assistance when needed. Plan to split out the work in specific components: descriptions, check availability information, check links, etc. Check the Documentation and Outreach team for editorial work and other ways where they can help.

We need to create a workflow for the work on TL and BP. The review should include checks on content, consistent language, working links and terminology and will be supported by the Documentation team.

Also publish the white paper on de EAC-CPF website. Another idea could be to update the bibliography to publish on the website.

Wrap-up and summary

Non-virtual wrap-up about the whole meeting.

Monday:

- Name spaces: has been moved to TS-EAS Schema team
- Spelling names: has been decided
- Entity type: discuss based on the paper prepared by Kerstin; put draft out for comments to the EAC-team and Regine and Kathy, and add comments to the GitHub issues as discussed in the EAC-team, attendees of the meeting and Kathy.
- Comments on Link or Reference attributes, and Convention Declaration (the link issue) were discussed. These can be easily discussed in the virtual meeting. Silke will ask Mark to finalise his paper, to be put forth in the April meeting.
- No solution was found for the 'localtype or type' question. That was put forward to the Schema team.
- Noting the authority institution for a record identifier: tendency to use the 'Vocabulary source' attribute. Not resolved yet is the naming, i.e. to either stick to 'vocabulary' or use 'authority' instead.

- The ObjectBinWrap or ObjectXMLWrap question in sources (should we keep this at all) would be an issue that can be resolved in the virtual meeting, following Mark's paper. Otherwise this might be a topic for the TS-EAS: the function of EAS instances should be to point to other sources; not to incorporate them. Silke will suggest to put this on the agenda for Chicago.
- Usage of 'descriptivenote' and sub-elements of plural/singular elements warrants a short overview paper on where they are used and a recommendation on what to do with them, with example samples. (Check for next meeting: all papers should have a recommendation in them, to guide the conversation.) Try to solve this in a virtual meeting in late May.

Tuesday
- The Relations Proposal was agreed upon, with a few comments. The xml-wrapper would still be available, because it is not discussed in the paper: it is a part of the above solution on the agenda for Chicago.
- The main thing to take away from the Referencing attributes was the use of targets, also discussed in the Assertion Description paper. Request to Caitlin to ensure the points mentioned in her paper have been incorporated in this version.
- The discussions on RiC-Ontology and EAS-Schema are in the notes.

Wednesday
- The EAD/EAC-reconciliation presentation covered quite some ground (see the presentation in the Wednesday folder), but some additional issues remained and were revisited:
    - agencycode (slide 87): confirmation that @status with <agencycode> would be used with the values "authorized" and "alternative"
    - p (slide110): some of these sub-elements from EAD would not be of use for EAC, and should be avoided there; needs to be reviewed and technical options need to be explored; the same applies to abstract, item and event, which are shared elements using the same content model
    - language (slide 121): align these with EAD3 (names and definitions)
    - script (slide 126): this element might be a problem for processing; furthermore, we have an element and attribute with the same name, what we would want to avoid; EAD team to discuss alternative name (e.g. writingsystem) and to put suggestion to EAC team for approval/adoption.
    - abbreviation (slides 137 to 148): abbreviation and citation are together in control. Ask Caitlin if she wants to do a paper on this for Chicago.
    - date vs datesingle (slides 173 to 181): date in EAC-CPF has never before been a known issue, but might have to be aligned with EAD3. Wait for the discussion on this in June
    - daterange (slide 186): should this have a @status attribute ("unknownstart", "unknownend")? This will be taken to the April meeting

- eventtype (slide 217): should follow the same content model as maintenancestatus and publicationstatus, i.e. should be an empty element with no text
- eventdatetime (slide 222): EAD3 currently defines the date variants in the schema directly; decision pending to either remove it from EAD3 or add it for EAC-CPF
- agenttype (slide 229): should follow the same content model as maintenancestatus and publicationstatus, i.e. should be an empty element with no text
- sources with sub-element source (slide 243): will need to follow finalisation of the assertion description topic and based on the changes to <source> proposed in this context
- Other shared elements, not part of <control> (slide 245): address with addressline; bioghist with abstract, chronitem, chronlist, event, item, and list; function and occupation with term; legalstatus; part; possibly two discussions with bioghist (and related elements) being a possible Chicago-topic (and possibly this whole slide)
- Similar elements (slide 247)

Next steps and deadlines

Silke has created a project in GitHub for the overall release of the review and wants to add milestones for Schema, Documentation, Tag Library, Review, etc. Seems like a good way of setting up and handling a workflow; keeping in mind that most of the work will not happen in sequence. Karin will talk to Carl Wilson, OPF, who is aiding with GitHub procedures next week to see if he has any suggestions.

The old issues and comments can be closed when they're transferred to a new one.

The next virtual meeting is on April 3rd. Silke will propose to meet jointly with the EAD team and the schema team in July 2020 to go over the reconciliation work.

Decisions

Topic	Decision	Issue
Documentation	Add technical cardinality next to the description in the TL. Adapt EAD3 solution for availability information. The Tag Library should contain: conventions, release notes, crosswalk. Text on background moves to the	#20

	website. The glossary should be part of the Best Practise Guide.	